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AUTHOR	Campbell, Creola S.
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ABSTRACT

An instructor's manual and student activity guide on general clerical work related to the consumer market are provided in this set of prevocational education materials which focuses on the vocational area of office occupations. (This set of materials is one of ninety-two prevocational education sets arranged around a cluster of seven vocational offerings: agriculture, home economics, distributive education, health occupations, world of work, trade and industry, and office occupations.) The instructor's guide is organized into the following elements: title of activity, duration of activity (four to six days), activity goals, four instructional objectives, related vocational clusters and activity implementation (description, materials needed, safety considerations, teacher preparation prior to class, during the class, follow-up activities, answer keys to student check point activities, and masters for duplication). The student activity guide provides step-by-step instructions (narrative and illustrations) for completing each instructional objective. At the end of each set of instructions is a student check point (evaluation activity). Twelve occupational descriptions (e.g., order clerk, inventory clerk, invoice-control clerk, sales attendant, purchasing agent) conclude the document. (CT)

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OFFICE OCCUPATIONS – GENERAL CLERICAL, CONSUMER

Kit No. 25

INSTRUCTOR'S MANUAL

Prepared by

Creola S. Campbell
Southside High School
Greenville, South Carolina 29607

State Department of Education
Office of Vocational Education
Prevocational Education
Columbia, South Carolina 29201

In Cooperation With

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

1978

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TITLE OF ACTIVITY

Kit No. 25, Office Occupations–General Clerical, Consumer

DURATION

Main Activity – 3 days
Follow-up Activity – 1 to 3 days

GOALS

The student will attain an understanding of the importance of accuracy and neatness in completing forms.

The student will have a feel for working with record keeping and merchandise.

The student will gain knowledge of the economics of marketing.

The student will understand the desirability of comparative shopping.

INSTRUCTIONAL OBJECTIVES

The student will prepare the forms to purchase, inventory, and sell goods, given information and directions for completing the forms.

The student will when given prices, tags and merchandise, group, price, and place merchandise on counter.

The student will when given a questionnaire about consuming, complete the questionnaire satisfactorily (passing 70%).

The student will when given unit prices, group prices, and merchandise quality, compute the better buy.

VOCATIONAL CLUSTERS

Distributive Education

ACTIVITY IMPLEMENTATION

A. Description

First Day:

On the first day introduce the activity by reading the Introduction in the Student Guide and showing the filmstrip presentation.

Second Day:

Assign occupational tanks. Be sure the Secretary-Bookkeeper for the Novelty Shoppe, the Warehouse Supervisor, and the Receptionist in Better Buy Bureau understand the importance of the positions. Set up stations using name plates for the Novelty Shoppe, Inc.; Warehouse; and Better Buy Bureau.

Give students their job assignments. After stations are set up and workers assigned to each station: Begin the activity with the Purchase Order in the Novelty Shoppe being completed, picked up by the Courier, and delivered to the Warehouse Supervisor who gives the Order Clerk the purchase order. The Order Clerk fills the order by following directions and the shipping room clerk prepares the order to go out. (This could be the stopping point for the day's activity.)

Third Day:

Courier picks up the order from the warehouse and delivers to the Novelty Shoppe. The Sales Clerks mark, price, and place goods on the counter. Professional Shoppers come in and purchase goods (according to purchase sheets). Sales Clerks must write receipts. Sales clerk will not have money, so credit vouchers are given if a customer does not have correct change. Merchandise is taken back to the Better Buy Bureau and Accountants calculate cost. Receptionist gives report to class about the prices. The entire class completes a "Questionnaire" (actually, a check-up).

B. Safety

For each station, some setting up of tables, desks, and equipment to simulate the center will occur. Caution students about bumping into each other and moving carefully.

C. Materials Required

1. Audio Visual Equipment:
   Filmstrip projector
   Screen
   Cassette player

2. Technical Equipment
   Calculators for Better Buy Bureau
   Name plates for stations and job

titles
2 wire baskets

3. Expendable Materials:
   Order Forms
   Carbon paper
   Receipt books (from Masters)
   3 manila folders – one each for Better Buy Bureau, Warehouse, The Novelty Shoppe
   Merchandise: items to be sold – (instructor's decision)
   Suggestion: go to a stationery or party shop and get favors, novelty items, gum, stick candy, puzzles, etc. (number will depend on class size). Try to have at least 3 items per student. The invoice calls for: 15 of 4 different items; 10 of one item; and 5 of another item; 75 items in all.
   Bags or boxes for merchandise to be placed at warehouse and shop
   3 or 4 business envelopes
   Rubber bands to put groups of merchandise together (i.e., 3 sticks of candy)
   Sufficient supply of duplicated papers from masters.
   Play money – $50 of $1 bills

D. Preparation Prior to Class

First Day:

Have projector and cassette player ready. Also, have job assignments ready to give to students.

Second Day:

Have stations ready. The Novelty Shoppe needs counter tops and a desk or two back of it for the Secretary-Bookkeeper; the Warehouse needs some type of shelves. Along with the merchandise, the Warehouse might have some paperback books or other available items on the shelves. The Better Buy Bureau will need only three desks for the accountants and a chair or two for shoppers. The students will have instructions for completing the stations.

Third Day:

Let students continue. Be sure enough copies have been duplicated of Consumer Questionnaire which may serve as a quiz.

E. During Class Session

First Day:

Show filmstrip; stop at the question points and discuss what is being consumed (will hold interest).

Second Day:

All students should be at stations and none idle. Silently supervise and involve all students. Check the figures on purchase orders when consulted by student. Follow the activity.

Third Day:

Continue with activity. Use instruction sheet and Consumer Questionnaire at end. Distribute the merchandise to class members if this is the kind of merchandise which students would like to keep -- pencils, candy, puzzles, gum. Perhaps some merchandise could be obtained from businesses in the area.

F. Follow-up Activities

1. Have each student fill out VIEW Fact Sheet.
2. Bring the Sunday newspaper and find ads where the same merchandise is being offered. Compare prices. Also, note grocery specials.
3. Have student copy the purchase orders given for duplication and complete the extending of prices, etc.
4. Have each student write his likes or dislikes about the job he was doing.
5. Have students bring in price tags from merchandise to compare. If possible, take students to a grocery store and compare unit and group pricing.

ANSWER KEY

PURCHASE ORDER:

Quantity	Stock No.	Description*	Unit Price	Amount
10	201		.15	$1.50
5	202		.20	1.00
15	203		.05	.75
15	204		.25	3.75
15	205		.10	1.50
15	206		.20	3.00
				TOTAL $11.50

*Description is at discretion of instructor.

INVOICE - - Figures should be the same.

PURCHASES BY PROFESSIONAL SHOPPERS

SHOPPER ONE:

Quan.	No.	Price	Total
5	201	.20 ea.	$1.00
2	202	.55	.55
Totals 7 items			$1.55

SHOPPER TWO:

Quan.	No.	Price	Total
3	203	.35	.35
10	204	.35 ea.	$3.50
Totals 13 items			$3.85

SHOPPER THREE:

Quan.	No.	Price	Total
3	205	.20 ea.	.60
2	205	.45	.45
Totals 5 items			$1.05

SHOPPER FOUR:

Quan.	No.	Price	Total
3	206	.25 ea.	$ .75
3	206	1.50	$1.50
Totals 6 items			$2.25

Best buy is in the single unit in some cases. Be sure students understand that packaged goods cost more because of labor and packaging. In some purchases, there will be no "Best Buy" if prices are the same for groups as units.

ANSWERS TO QUESTIONNAIRE

1. c
2. b
3. answers will vary: friendly, accurate, helpful
4. c
5. English, Math, General Business
6. a
7. a
8. a,b,c, (all three)

MASTERS FOR DUPLICATION

1. VIEW Fact Sheet
2. Personnel Rosters
   The Novelty Shoppe, Inc.
   Wholesale Warehouse
   Better Buy Bureau
3. Stock Inventory List
4. Purchase Order
5. Receipt Slip and Credit Voucher
6. Price Tag Information List
   --Instructions for Preparing Tags
7. Inventory List
8. Invoice
9. Delivery Slip for Courier
10. Warenouse Supervisor Checklist
11. Shopper's Checklist
12. Professional Shopper's List and Prices
13. Comparative Pricing Form
14. Questionnaire
15. Follow-up Activity
    --Instructions
    --Purchase Order

VIEW FACT SHEET

NAME _____ CLASS _____ OCCUPATION _____

A. List the advantages (good points) of this occupation (job).

B. List the disadvantages (bad points) of this occupation (job).

C. List three things you should know to do this occupation (job).
1.
2.
3.

D. What type of education should you get to be prepared (do) for this occupation (job)?

E. What courses must you take to go into this occupation (job)?

F. What do you think your future in this occupation (job) will be?

G. What wage can you expect in this occupation (job)?

H. What are the working hours of this occupation (job)?

I. To learn more about this occupation (job), write to:

J. Using a scale of 1 to 5, circle the number that measures your interest in this occupation (job) as a possible career.

I don't like it. 1 2 3 4 5 I like it.

THE NOVELTY SHOPPE, INC.

PERSONNEL ROSTER

Secretary-Bookkeeper _____

Sales Clerk(s) _____

_____

_____

_____

Purchasing Clerk _____

Invoice Clerk _____

Inventory Clerk _____

ATTENTION: When all positions have been filled, the secretary-bookkeeper will give this roster to the instructor.

WHOLESALE WAREHOUSE

PERSONNEL ROSTER

Supervisor _____

Order Clerk _____

Shipping Room Clerk _____

Dispatcher _____

ATTENTION: When all positions have been filled, the supervisor will give this roster to the instructor.

BETTER BUY BUREAU

PERSONNEL ROSTER

Receptionist _____

Professional Shoppers _____

_____

_____

_____

Accounting Clerks _____

_____

_____

ATTENTION: When all positions are filled, the receptionist will give the roster to the instructor.

STOCK INVENTORY LIST

ITEM	STOCK NO.	DESCRIPTION	UNIT PRICE	IN	SOLD	NEED
A	201		.15	5	35	10
B	202		.20	10	40	5
C	203		.05	0	50	15
D	204		.25	0	50	15
E	205		.10	0	50	15
F	206		.20	0	50	15
					TOTAL	75

THE NOVELTY SHOPPE, INC.
301 Desk Street
Doorway, SC 29307

purchase order

Ordered from

WHOLESALE WAREHOUSE
4 Blackboard Lane
Classton, SC 29654

Order No. _____
Ship Via _____
Date _____
Terms _____

Quantity	STOCK NO.	Description	Unit Price	Amount

_____
purchasing agent

12

13

RECEIPT SLIP AND CREDIT VOUCHER FOR SALES CLERK

RECEIPT SLIP:

Received from _____ $ _____

for: _____

Stock No. _____ Price _____ Total Amount _____

Stock No. _____ Price _____ Total Amount _____

TOTAL: _____

_____ _____

Date Sales Clerk Signature

CREDIT VOUCHER:

Be it known that _____ is entitled to $ _____ in credit at The Novelty Shoppe, Inc.

_____ _____

Date Sales Clerk Signature

SALES CLERK

Price Tag Information List

Stock No.	No. Ordered	Sell for: Each	Two for:	Three for:
201	10	.20	.35	--
202	5	.25	.55**	$1.00
203	15	.10	.20	.35**
204	15	.35	.65	$1.25
205	15	.20	.45	.75
206	15	.25	.50	$1.50

**These items are to be packaged in plastic or bound together in groups of two and three by rubber bands, etc. before being priced.

Prepare tags:

10 for .20 ea.
1 for .25
4 – 2 for .55
9 @ .10
6 at 3 for $.35
12 @ .35
3 @ 3 for $1.25
5 @ .20
10 @ 2 for .45
6 @ .25
6 @ .50
3 @ $1.50

INVENTORY LIST

ITEM STOCK NO.	KEPT ON HAND	SOLD	NEEDED
201	45	35	_____
202	45	40	_____
203	65	50	_____
204	65	50	_____
205	65	50	_____
206	65	50	_____

WHOLESALE WAREHOUSE
4 Blackboard Lane
Classton, SC 29654

INVOICE

Sold to

Date _____

Our Order No. _____

Cust. Order No. _____

Shipped Via _____

Terms

Quantity	Description	Unit Price	Total

13

17

18

DELIVERY SLIP FOR COURIER

_____ 19 ____
Date

Delivered to: _____

from: _____

Received by: _____
(customer's signature)

_____
Courier

WAREHOUSE SUPERVISOR

CHECKLIST

QUANTITY	DESCRIPTION	SIGNATURE RECEIVED

SHOPPER'S CHECK LIST

ITEM NO.	NUMBER PURCHASED	GIVE PRICE PAID
Example: 110	7	5 for .20 each 2 for .35

TOTAL COST $ _____

PROFESSIONAL SHOPPER'S LIST AND PRICES

Shopper One:

	No.	Price
Purchase Stock No. 201	5	$ .20
202	2	$ .55 (for 2) sells for $.25 each (2 for $.55 packaged)

Shopper Two:

Purchase Stock No. 203	3	$ .35 (for 3) sells for .10 each (3 for $.35 in package)
204	10	$ .35 each

Shopper Three:

Purchase Stock No. 205	3	$ .20 each
205	2	$ .45 (sells for .20 each) (2 packaged for .45)

Shopper Four:

Purchase Stock No. 206	3	$ .25 each
206	3	$1.50 (in package)

COMPARATIVE PRICING FORM

ACCOUNTANT'S COMPUTATION SHEET

ITEM NO.	PURCHASED	PRICE PAID	UNIT PRICE
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

BEST BUY FOR THESE ITEMS WAS:

_____	_____	_____	_____

_____

Accountant

QUESTIONNAIRE

1. Articles are less expensive when purchased:
   a. One at a time
   b. In groups of two or more
   c. After comparing the unit and group prices

2. The merchandise cost more when it has been packaged because:
   a. It stays cleaner
   b. Packing cost money and people must be paid to do the packaging
   c. It looks nicer

3. List 3 personality traits sales clerks should possess:
   1.
   2.
   3.

4. Which of these would be the best buy?
   a. one for .75
   b. two for $1.55
   c. three for $2.20

5. A person writing invoices should write neatly. What subjects might help him/her improve his/her handwriting?
   1.
   2.

6. Consumers are:
   a. Everyone who uses energy, materials, food, services, and goods
   b. People buying cars
   c. Customers in a restaurant

7. Couriers
   a. Carry messages, merchandise or money between clients
   b. Know how to groom pigeons for messengers
   c. Work for the post office

8. Copies are kept of business letters, invoices, and order forms because:
   a. People need to keep records
   b. A record of the business transaction will be available
   c. The original may get lost

FOLLOW-UP ACTIVITY

Place the following information on the Purchase Order form. Use today's date. Terms: Net 30 days
Shipped Via: Express . Complete the form by extending the price total.

Send order to: Ski & Skate, Inc. , 103 Ocean Blvd., Santa Monica, CA 56919

Quantity	Cat. No.	Description	Price	Total
10	2354	Skateboards	$30.00	_____
2	4003	Knee Pads	$12.50	_____
14	4507	Helmets	$ 8.00	_____
5	1317	Shoes	$17.50	_____
				_____ TOTAL

Send order to:

Supplies, Inc.
1414 West Dublin St.
Easttown, NC 28335

Quantity	Cat. No.	Description	Price	Total
200	456	Notebooks	$1.50	_____
150	303	Ballpoint pens	$ .10	_____
175	201	Paper packages	$ .50	_____
255	153	Erasers---ink type	$ .30	_____
				_____ TOTAL

FOLLOW - UP ACTIVITY

PRE - VOC HALL
222 HALL DRIVE
WHEREVILLE, SC 29612

PURCHASE ORDER

Date _____

TO

Terms _____

Shipped Via: _____

Quantity	Cat. No.	Description	Price	Total

26

By: _____
Purchasing Agent

21

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OFFICE OCCUPATIONS – GENERAL CLERICAL, CONSUMERS

Kit No. 25

STUDENT
LEARNING ACTIVITY GUIDE

GROUP INTERACTION

Prepared by

Creola S. Campbell
Southside High School
Greenville, South Carolina 29607

State Department of Education
Office of Vocational Education
Prevocational Education
Columbia, South Carolina 29201

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GENERAL CLERICAL, CONSUMERS

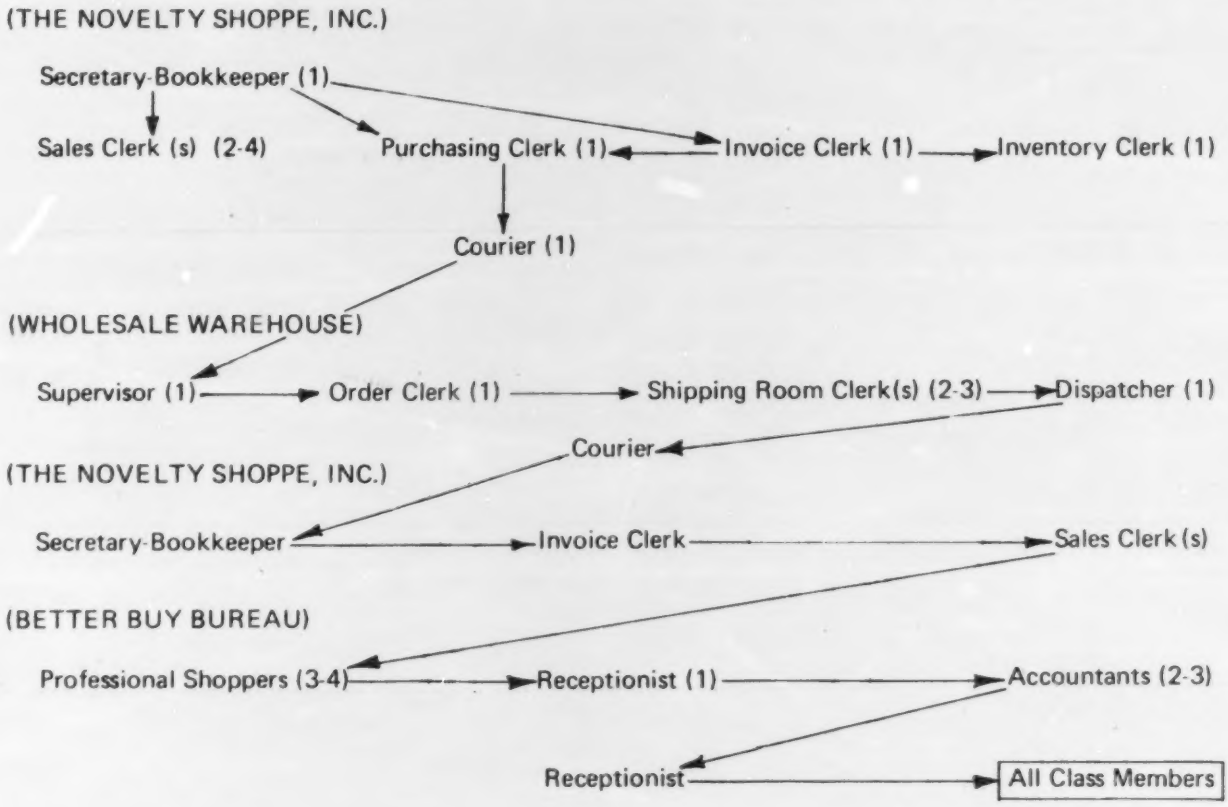
INTRODUCTION

In this activity we are concerned with occupations in warehouses, stores, and businesses that require office skills; we will be doing some comparative shopping to learn about being wise consumers and getting the most for our money.

Some occupations involving office skills are Purchasing Clerks, Sales Clerks, Invoice and Inventory Clerk, Order Clerk, Courier, Accountants, Secretary and Bookkeeper. In any office occupation an important part is writing neatly and being accurate. Forms must be completed to order goods; invoices must be checked when orders are received; and prices must be affixed to merchandise for sale. Also, we will see the occupation of Professional Shopper. Although a fairly new occupation, professional shoppers at times work for department stores and shop for telephone customers, or professional shoppers may work for bureaus that compile statistics for economic and research purposes or governmental agencies in checking prices for consumer protection.

To introduce this activity, we will view the filmstrip presentation "WHAT IS A CONSUMER?"

FLOW CHART



The secretary-bookkeeper will give work assignments to sales clerks, purchasing clerks, invoice and inventory clerks. The invoice and inventory clerks will determine needs and inform purchasing clerk who will order new stock. Courier delivers order to warehouse supervisor who checks it and gives it to order clerk to fill. Merchandise is given to shipping room clerk to package. Dispatcher affixes address and arranges for courier to pick up and deliver merchandise to Novelty Shoppe; the secretary-bookkeeper records delivery and gives shipment to invoice clerk who checks merchandise against invoice. Sales clerks price merchandise and sell it to shoppers who return to the Better Buy Bureau where the receptionist records purchases and accountants figure unit prices. The receptionist gives report to class members on cost per unit and class fills out questionnaire about merchandise.

DIRECTIONS

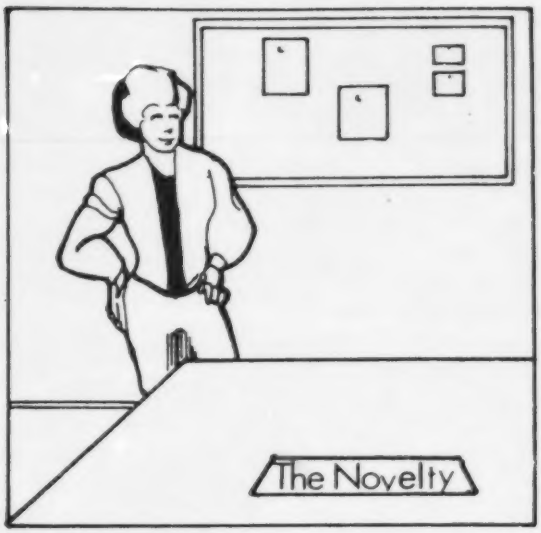
Follow the step-by-step directions given in the programmed text. Read your instructional objective carefully before going to the steps. After the steps are completed, do the checkpoint to test your understanding and see if you have accomplished the objective.

PROGRAMMED TEXT

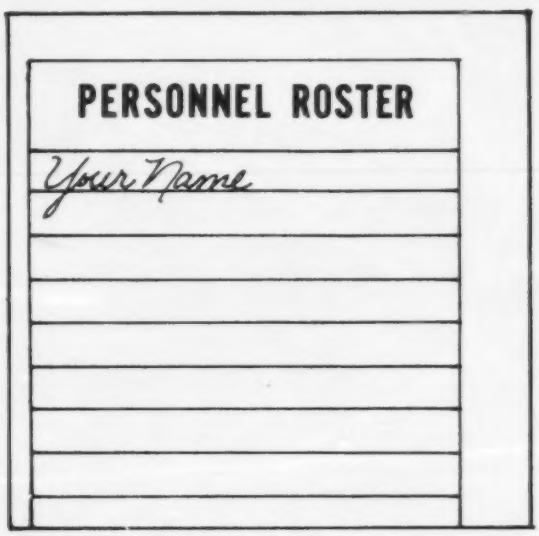
Instructional Objective 1

Given job assignments, the workers will report to their stations.

STEP 1 – Receive job assignments from the instructor.



STEP 2 – Report to station.



STEP 3 – Look on the Station Personnel Roster to be sure you are in the correct position.

Check Point

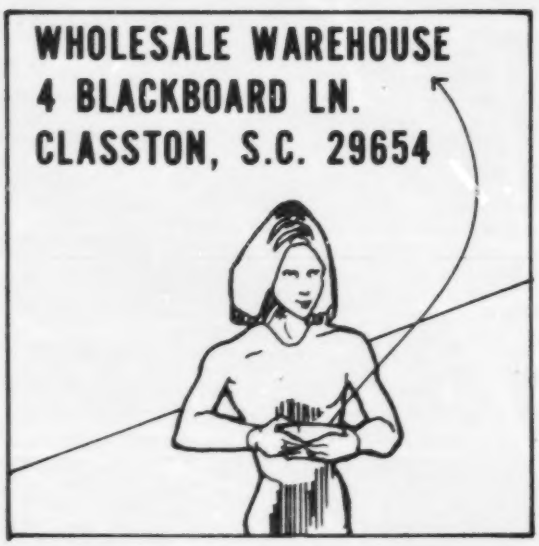
Find your position on the Personnel Roster and write your name beside the job. Hand to the instructor when all positions are filled.

NOVELTY SHOPPE, INC.
COURIER: INDEPENDENT MESSENGER

Instructional Objective 1

Given the position of courier, the student will deliver messages, merchandise, and goods between shops, warehouses, and businesses.

STEP 1 – Receive purchase order from The Novelty Shoppe, Inc.

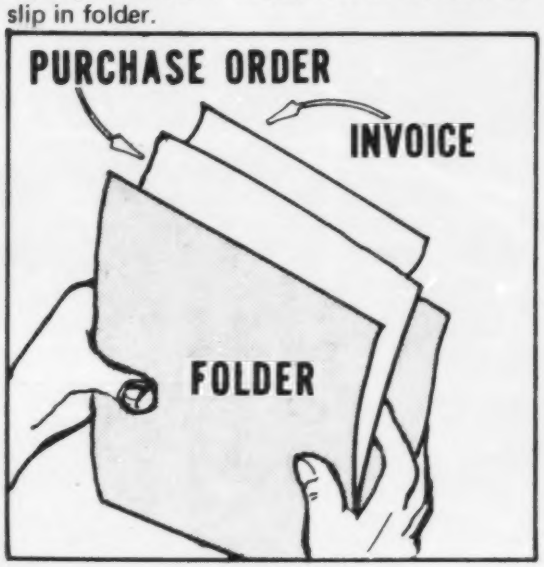


STEP 2 – Look at address on envelope.

STEP 3 – Take to the correct station.

Check Point

Deliver purchase order and have delivery slip signed. Return to station and file delivery slip in folder.



Instructional Objective II

Given an addressed package, the courier will deliver to the proper station.

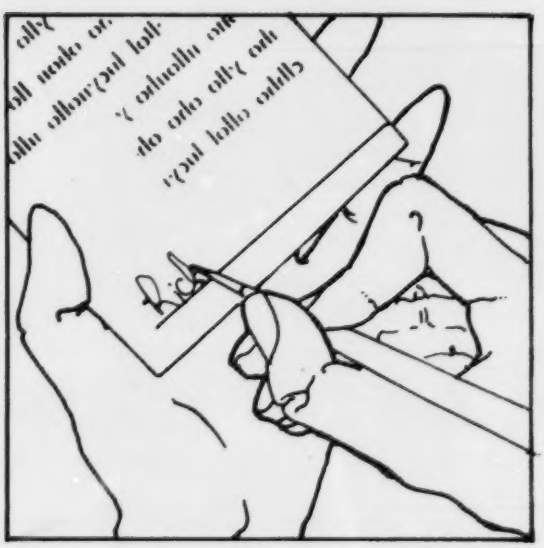
STEP 1 – Pick up package at delivery pick-up station at warehouse.

STEP 2 – Look at address.

STEP 3 – Take to the correct station.

Check Point

Have delivery slip signed.



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BETTER BUY BUREAU
RECEPTIONIST-CLERK

Instructional Objective 1

Given forms to distribute to employees, the receptionist-clerk will distribute to the professional shoppers and accountants the directions and forms necessary for their jobs.

STEP 1 – Receive from the instructor the necessary papers for the Better Buy Bureau.

STEP 2 – Give professional shoppers the programmed text, shopping list, and check list. Also, give each shopper $6.00 game money.

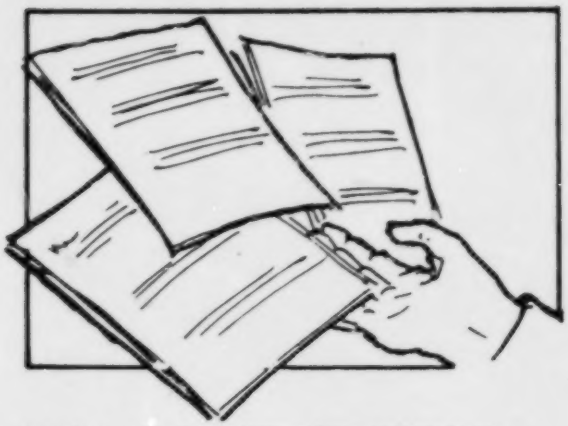
STEP 3 – Give each accountant the programmed text and comparative price form. Instruct each accountant to become familiar with the calculator to be used.

Check Point

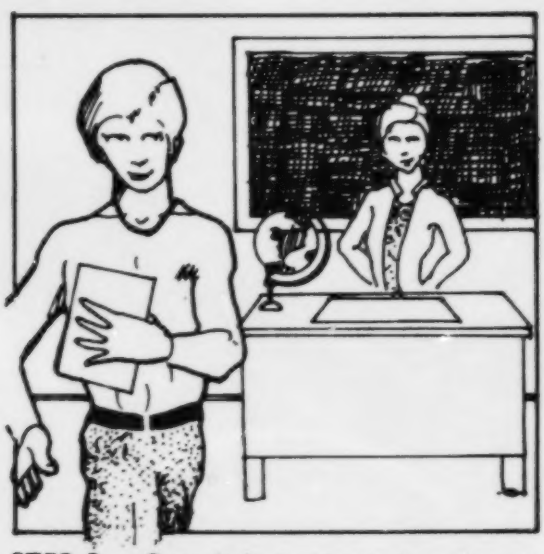
Does each employee have and understand directions? Consult instructor. Consult flow chart for your point of entry into activity.

Instructional Objective II

Given comparative pricing forms, the receptionist-clerk will report the finding of each shopper to the class.



STEP 1 – Receive forms from accountants.



STEP 2 – Consult instructor to be sure you understand all information.

STEP 3 – At instructor's directions, give report to class.

STEP 4 – Receive questionnaires from instructor and give to each member of the class.

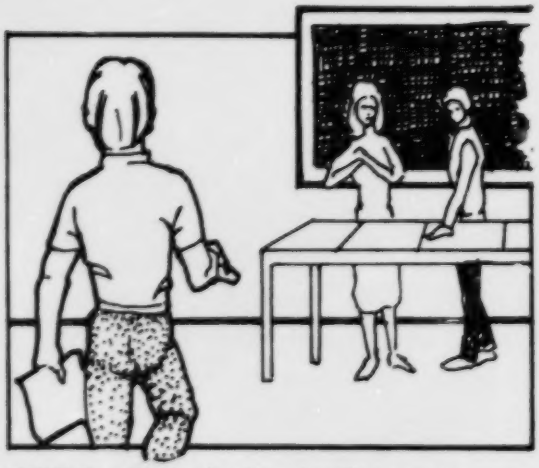
Check Point

Instructor will check your results on findings.

Instructional Objective 1

Given a list of items to buy, professional shoppers will locate items and prices correctly and make purchases.

STEP 1 – Receive list of items and money to purchase items.



STEP 2 – Go to the Novelty Shoppe, Inc.

STEP 3 – Locate items to purchase.

STEP 4 – Exchange money for items. Receive items and sales slip.

STEP 5 – Return to Better Buy Bureau. Give merchandise and sales slip to accountants.

Check Point

Take list and sales slip and merchandise and check to see that all tally the same. Place a check mark on the list and sales slip as you count items. Give items and sales slip to accounting clerks.

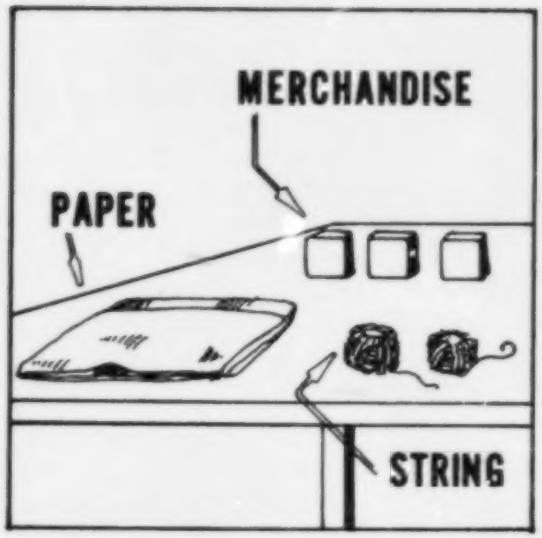
SUPERVISOR – WHOLESALE WAREHOUSE

Instructional Objective 1

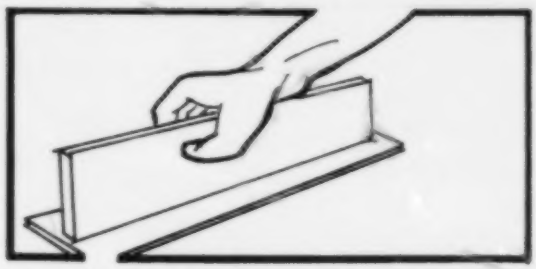
Given directions, the warehouse supervisor will place merchandise in a neat arrangement near materials for packaging and set up work stations for personnel.

STEP 1 – Receive merchandise items and packaging materials from instructor.

STEP 2 – Place merchandise on table or desk. Arrange by stock numbers.



STEP 3 – Place materials for packaging nearby. Packaging may be bags, boxes, envelopes – whatever is needed for the merchandise to go safely to the customer.



STEP 4 – Place name plates for jobs in position.

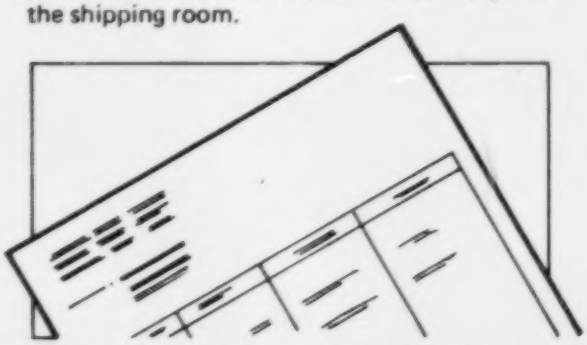
Check Point

Use the check list provided by your instructor to see that all merchandise and materials are received.

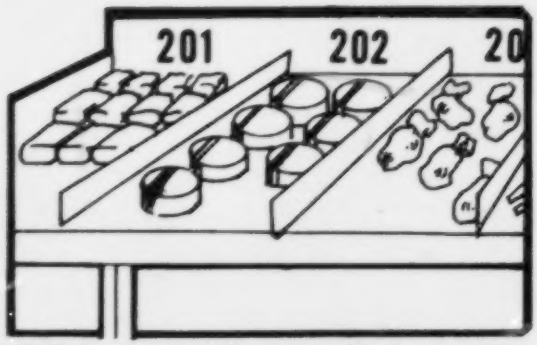
ORDER CLERKS – WHOLESALE WAREHOUSE

Instructional Objective 1

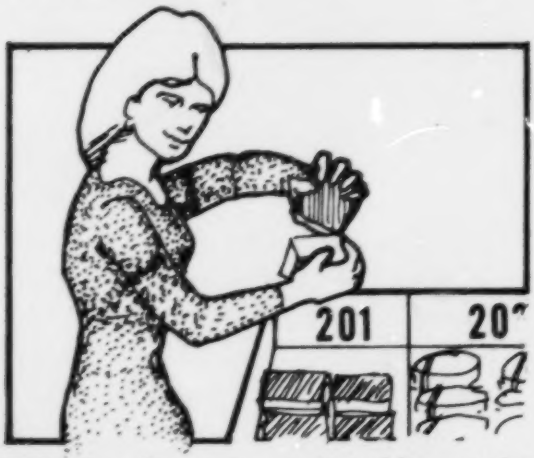
Given a purchase order by courier, the order clerk will pick up the items ordered and place them in the correct containers to go to the shipping room.



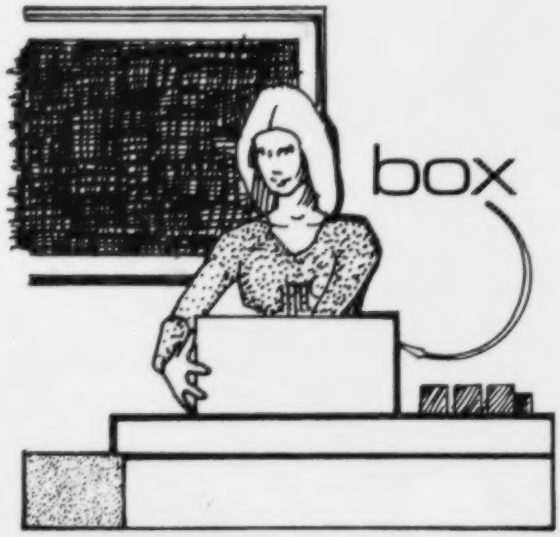
STEP 1 – Read the purchase order item by item.



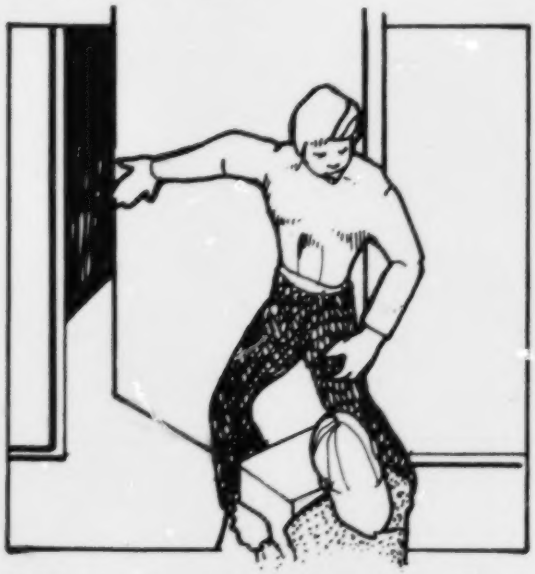
STEP 2 – Locate the item ordered among the merchandise.



STEP 3 – Count the number of items to be sent.



STEP 4 – Place items in containers -- DO NOT SEAL OR SHUT.



STEP 5 – Give items and purchase order to the shipping room clerk.

Check Point

Go over the order item by item with the shipping room clerk. If an order is not correctly filled, repeat steps.

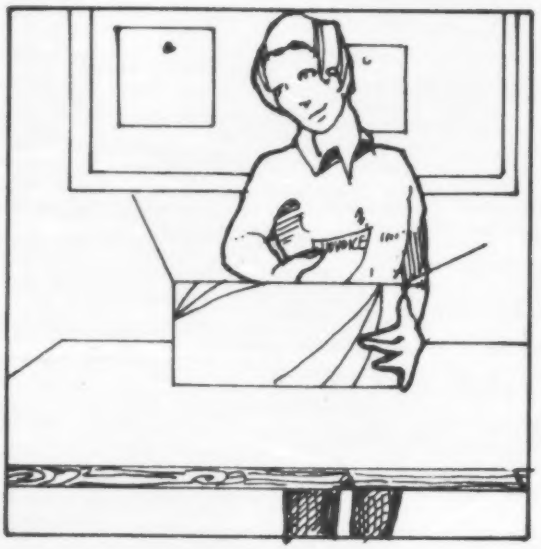
39

DISPATCHER – WHOLESALE WAREHOUSE

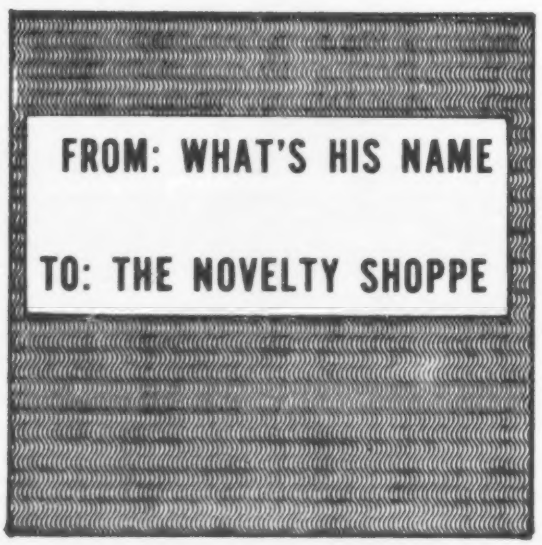
40

Instructional Objective 1

Given a package with invoice, the dispatcher will address a label, affix it to the package, and give package to courier.



STEP 1 – Receive package and take Invoice out and locate address of customer.



STEP 2 – Address a label to customer, paste it (glue or scotch tape) to the package. Seal package.

STEP 3 – Signal courier to pick up package.

Check Point

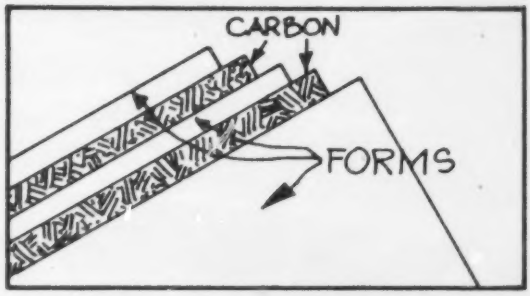
Be sure package is closed, sealed, and addressed correctly.

SHIPPING ROOM CLERK – WHOLESALE WAREHOUSE

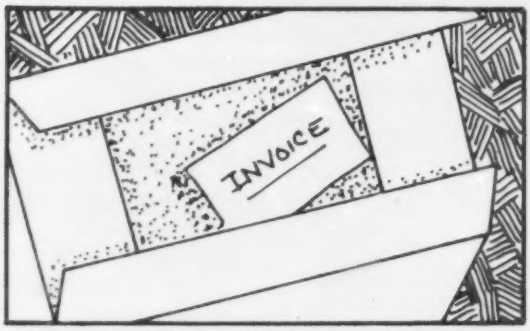
Instructional Objective 1

Given completed orders and merchandise, the shipping room clerk will complete an invoice, seal packages, and have package ready for delivery by courier.

STEP 1 – Look at the purchase order.



STEP 2 – Transfer the items asked for on the invoice form. Make a carbon copy or two copies and keep one copy.



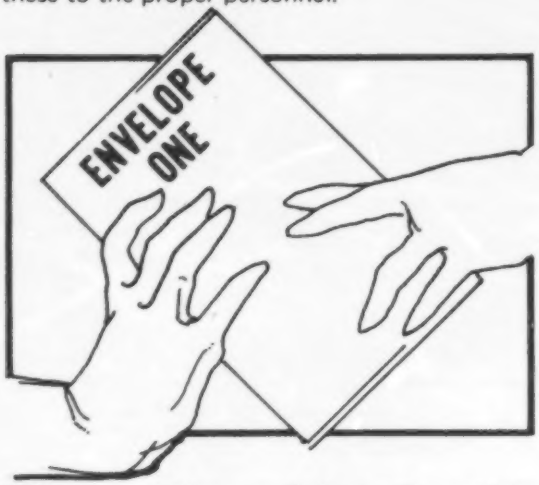
STEP 3 – Be sure the amount due is correct. Put invoice in package with merchandise.

Check Point

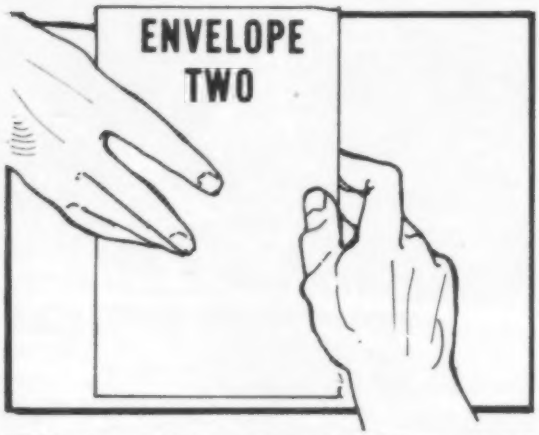
Place purchase order and one copy of the invoice in warehouse folder. Return folder to supervisor. Give package to dispatcher.

Instructional Objective 1

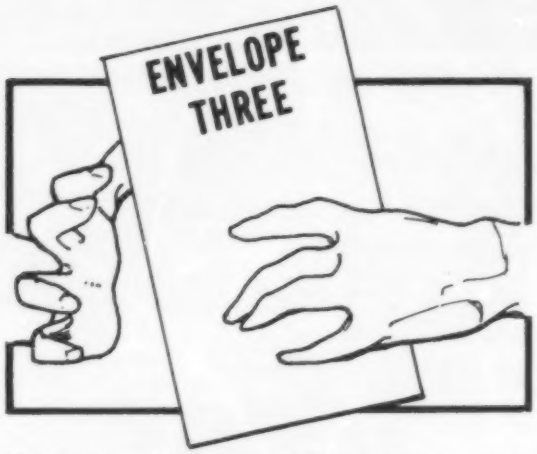
Given forms, the secretary will distribute these to the proper personnel.



STEP 1 – Make up Package One which contains a stock inventory list, with prices, and purchase order forms to present to the purchasing clerk.



STEP 2 – Make up Package Two which contains sales receipt forms and price tag information and present to the sales clerk.



STEP 3 – Make up Package Three which contains inventory list and programmed text for stocking and pricing merchandise to be received and present it to the invoice-inventory clerk.

Check Point

Ask each clerk to make a list of materials in the package and sign name and position to you. Check the list to be sure all supplies have been included. File list in folder one.

Instructional Objective II

Given a package from the warehouse, the secretary-bookkeeper will open the package, check to see that the invoice is inside, and give package to invoice and inventory personnel.

STEP 1 – Receive package from courier and sign slip.

STEP 2 – Open package and check to see that invoice is enclosed.

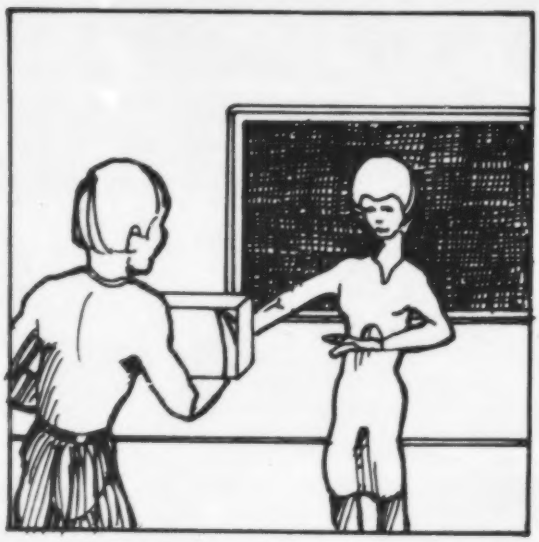
STEP 3 – Give package to invoice and inventory clerks.

Check Point

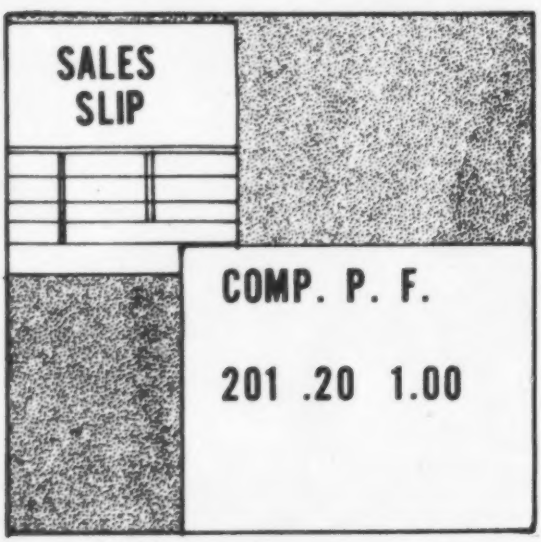
Be sure all merchandise remained in the package. When clerk brings invoice form back, place it with copy of purchase order form in the folder.

Instructional Objective 1

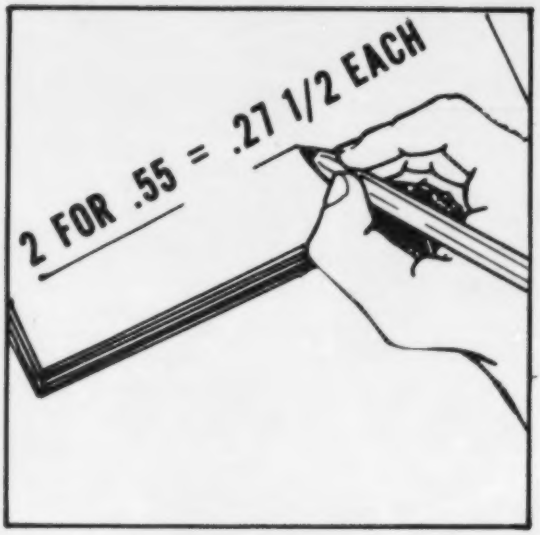
Given a number of items purchased at various prices, the accounting clerk will calculate the best price per unit and record information on a comparative pricing form.



STEP 1 – Receive merchandise and sales slip with prices on it from the professional shopper.



STEP 2 – Read and record information on the comparative pricing form about items.



STEP 3 – Calculate the cost per unit of the items that were bought in group packages.

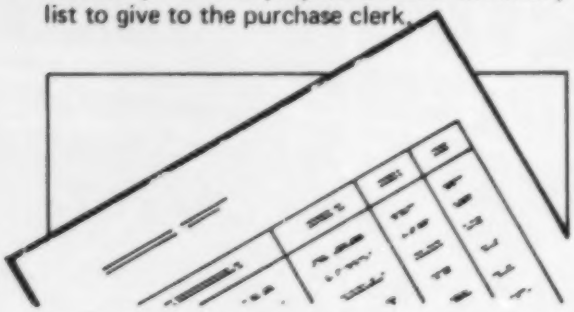
Check Point

Ask instructor to check your comparative pricing form when you have completed it. Hand it to the receptionist.

NOVELTY SHOPPE, INC.
INVOICE CLERKS and INVENTORY CLERKS (these two jobs work together)

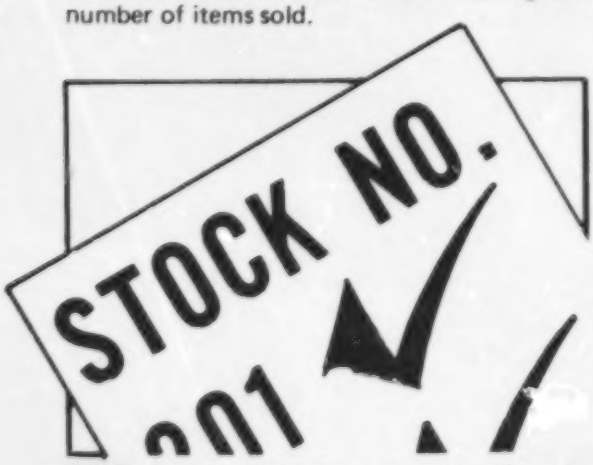
Instructional Objective 1

Given a packet of instructions, the invoice and inventory clerks will look over inventory list and prepare a stock inventory list to give to the purchase clerk.

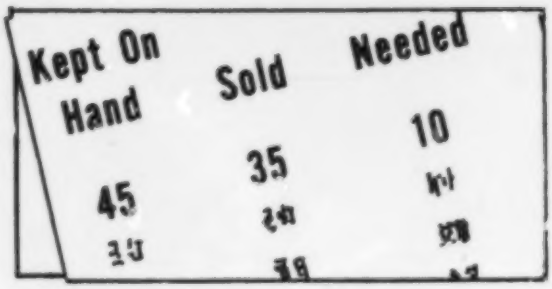


STEP 1 – Look at the inventory list.

STEP 2 – Locate the column telling the number of items sold.



STEP 3 – Locate the column telling the number of items desired to keep on hand.



STEP 4 – Subtract the number sold from the number kept on hand and place the answer in the number-needed column.

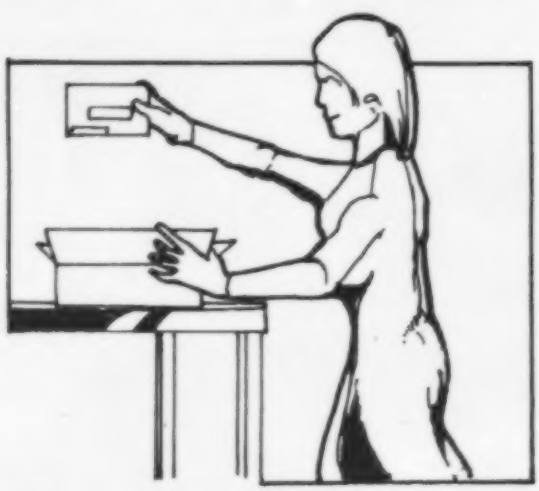
Check Point

Add number needed to number sold and check to see that it equals number kept on hand. When all numbers check out right, give stock inventory list to purchase clerk.

Instructional Objective II

Given an invoice and merchandise, the invoice and inventory clerks will unpack the merchandise and check invoice. They will transmit the checked invoice to the secretary-bookkeeper and the merchandise to the sales clerks.

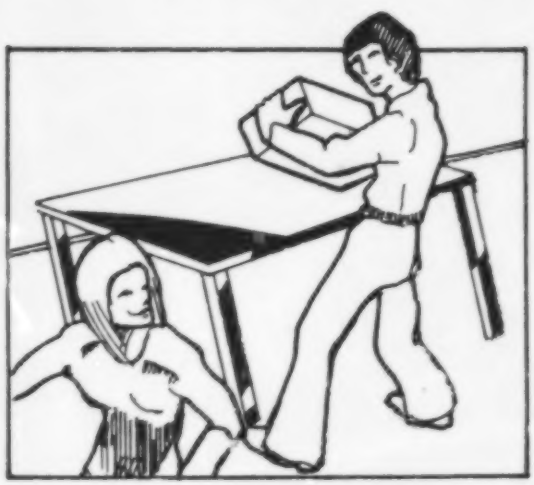
STEP 1 – Receive package from secretary-bookkeeper.



STEP 2 – Open package, find invoice slip that has been enclosed.

STEP 3 – Check items off by placing a check mark beside the stock number on the invoice if correct number is received and price is correct.

STEP 4 – Give invoice to secretary-bookkeeper.



STEP 5 – Give merchandise to sales clerks.

Check Point

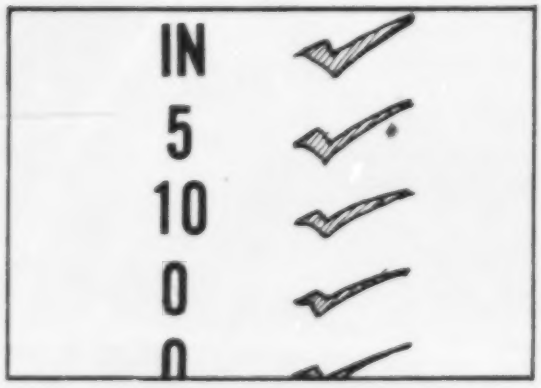
Confer with sales clerks after they have checked and priced merchandise. Use your Inventory List – NEED column.

THE NOVELTY SHOPPE, INC.
PURCHASING CLERK

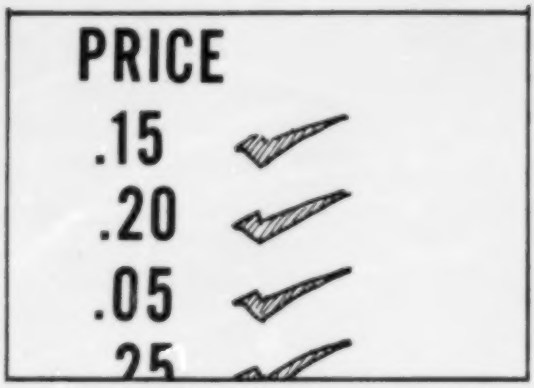
Instructional Objective 1

Given a stock inventory list with prices, the purchasing clerk will complete order forms and deliver to courier.

STEP 1 – Look at the stock inventory list.



STEP 2 – Place a check mark by any item that has 10 or less in stock.



STEP 3 – Look at the prices and check the items needed.

STEP 4 – Copy the name of the item and the price in the correct place on the purchase order. Copy other information to complete purchase order from the following data:

Information to use on purchase order:

- – Order No. 01342
- – Ship Via Courier
- – Date (use today's date)
- – Terms: 30 days full payment due
- – Quantity (the number needed)

STEP 5 – Compute the total cost by multiplying the unit price times the number of items ordered. Compute the total cost of the order.

Check Point

Ask the inventory clerk to check over the inventory list and purchase order with you. After the two of you have completed your check, show the purchase order to your instructor. Address the purchase order envelope to the warehouse supervisor and give to courier.

Instructional Objective 1

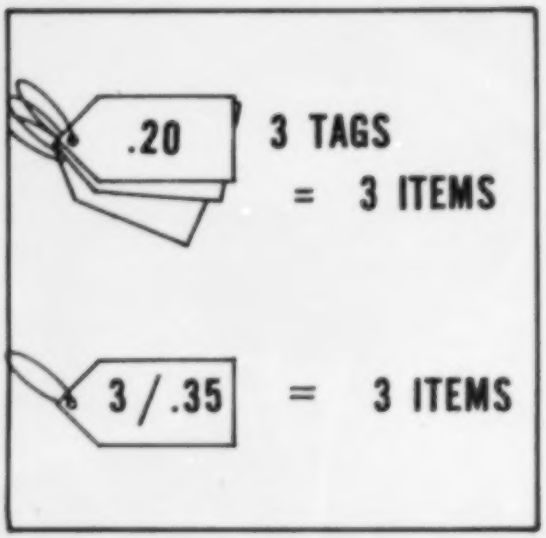
Given price tag information and tags, the student will mark tags and affix prices to items.

STEP 1 – Look at the price tag information list which gives the item stock number and the price per unit for two units and three units.

SALES	→	ITEM
CLERK		201
ONE		202

STEP 2 – Locate your item on the list.

STEP 3 – Prepare price tags as directed.



STEP 4 – Count your tags for items (be sure to count two or three items for group prices).

Check Point

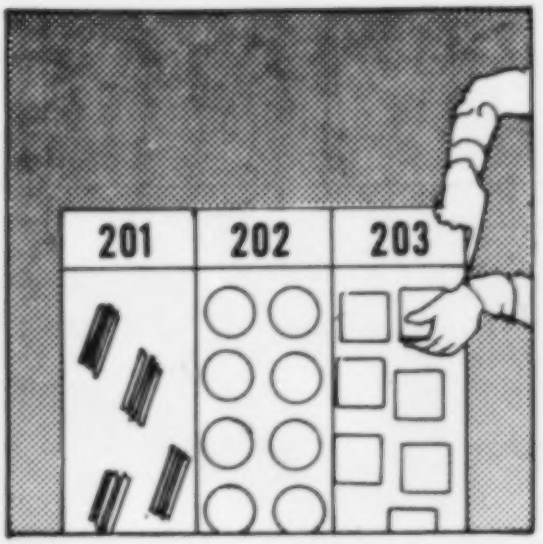
Does the total number of items agree with the No. Ordered of the item?

Instructional Objective II

Given items which have been ordered and received from the warehouse and checked by invoice clerk, the sales clerks will affix prices to items and place them on the counter for sale.

STEP 1 – Receive items.

STEP 2 – Affix prices to items as directed. If items are to be in groups of two or three, package together as instructor directs before pricing.



STEP 3 – Place items on counter, keeping each group separate.

Check Point

Count items and look back at the number ordered to be sure you have counter properly stocked.

Instructional Objective

Given a sales receipt form, the sales clerk will sell merchandise and complete form to give to customer.

STEP 1 – Greet customer by smiling and asking to help.

ITEM		PRICE
206	3 FOR	1.50
201	3 FOR 20	.60
	TOTAL	2.10

STEP 2 – Receive money from customer and write receipt for money.

STEP 3 – Give customer receipt and merchandise.

Check Point

Look at your copy of sales receipt and count your merchandise. Your merchandise on the counter plus the merchandise sold should equal the No. Ordered. Give receipts to secretary.

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249.367-054 ORDER CLERK (clerical) customer-order clerk; order filler; order taker.

Processes orders for material or merchandise received by mail, telephone, or personally from customer or company employee: Edits orders received for price and nomenclature. Informs customer of unit prices, shipping date, anticipated delays, and any additional information needed by customer, using mail or telephone. Writes or types order form and computes total cost for customer. Records or files copy of orders received according to expected delivery date. May ascertain credit rating of customer [CREDIT CLERK (clerical)]. May check inventory control and notify stock control departments of orders that would deplete stock. May initiate purchase requisitions. May route orders to departments for filling and follow up on orders to insure delivery by specified dates and be designated TELEPHONE-ORDER DISPATCHER (clerical). May compute price, discount, sales representative's commission, and shipping charges. May prepare invoices and shipping documents, such as bill of lading [BILLING TYPIST (clerical)]. May recommend type of packing or labeling needed on order. May receive and check customer complaints [CUSTOMER-COMPLAINT CLERK (clerical)]. May confer with production, sales, shipping, warehouse, or common carrier personnel to expedite or trace missing or delayed shipments [TRACER CLERK (clerical)].

222.387-026 INVENTORY CLERK (clerical)

Complies records of amount, kind, and value of merchandise, material, or stock on hand in establishment or department of establishment: Counts stock, material, or merchandise on hand and posts totals to inventory records. Compares inventories taken by other workers with office records or computes figures from sales, equipment, shipping, production, purchase, or stock records to obtain current theoretical inventory. Verifies clerical computations against physical count of stock and adjusts errors in computation or count, or investigates and reports reasons for discrepancies. Compiles information on receipt or disbursement of goods and computes inventory balance, price, and costs. Prepares reports of inventory balance, prices, and shortages. May list depleted items. May recommend survey of broken or unusable items. May operate typewriter, adding machine, or calculating machine. May be designated according to item inventoried as EQUIPMENT-INVENTORY CLERK (aircraft-aerospace mfg.); PROPERTY-AND-EQUIPMENT CLERK (petrol. refin.) or type of inventory as INVENTORY CLERK, PERPETUAL (clerical); INVENTORY CLERK, PHYSICAL (clerical) or work location as INVENTORY CLERK, STOCKROOM (clerical).

214.362-026 INVOICE-CONTROL CLERK (clerical) accounts-payable clerk; purchase-order checker.

Complies data from vendors invoices and supporting documents to verify accuracy of billing data and to insure receipt of items ordered: Compares invoices against purchase orders and shipping and receiving documents to verify receipt of items ordered. Computes entries on invoices and credit memorandums to determine prices and discounts, using calculator. Posts data to control records. Contacts vendors or buyers regarding errors in partial or duplicate shipments, prices, substitutions, and extensions. Maintains file of returnable items received from or returned to vendors. Writes check or prepares voucher authorizing payment to vendors.

299.677-010 SALES ATTENDANT (ret. tr.) attendant, self-service store.

Performs any combination of the following duties to provide customer service in self-service store: Aids customers in locating merchandise. Obtains merchandise from stockroom when not on floor. Directs or escorts customer to fitting or dressing rooms or to cashier. Keeps merchandise in order. May mark or ticket merchandise.

162.157-038 PURCHASING AGENT (profess. & kin.) buyer; director, purchasing; manager, purchasing; manager supply; purchaser.

Purchases raw materials or other unprocessed goods for processing, or machinery, equipment, tools, parts, produce, and other supplies or services necessary for operation of organization: Reviews

requisitions. Interviews vendors to obtain information concerning product, price, ability of vendor to produce product or service, and delivery date. Selects purchase items by testing, observing, or otherwise examining. Estimates values according to knowledge of market price. Reviews bid proposals from vendors and enters into contracts within budgetary limitations. Keeps records pertaining to items purchased, costs, delivery, product performance, and inventories. Discusses defects of purchased goods with quality control or inspection personnel to determine source of trouble and takes corrective action. May approve bills for payment. May be designated according to type of goods purchased as BUYER, ELECTRONICS (elec. equip.); BUYER, FISH (can. & preserv.); BUYER, FOOD (hotel & rest.); BUYER, FURS (whole. tr.). May be designated according to position held as MANAGER, STOREROOM (hotel & rest.); SUPPLY REQUIREMENTS OFFICER (gov. ser.). Additional titles: BUYER, MAPLE SIRUP (food prep., n.e.c.); BUYER, GISTICS OFFICER (gov. ser.); PIECE-GOODS BUYER (garment); PURVEYOR (hotel & rest.); STOCK BUYER (any ind.).

160.167-010 ACCOUNTANT (profess. & kin.) manager, office.

Directs and coordinates activities of workers engaged in general accounting, or applies principles of accounting to devise and implement system for general accounting: Directs and coordinates activities of workers engaged in keeping accounts and records, or performing such bookkeeping activities as recording disbursements, expenses, and tax payments. Prepares individual, division, or consolidated balance sheets to reflect company's assets, liabilities, and capital. Prepares profit and loss statements for specified accounging period. Audits contracts, orders, and vouchers, and prepares reports to substantiate individual transactions prior to settlement. May represent company before government agancies upon certification by agency involved. May work independently for fee or as member of accounting firm and be designated pendently for fee or as member of accounting firm and be designated as ACCOUNTANT, PUBLIC (profess. & kin.).

376.276-022 SHOPPING INVESTIGATOR (bus. ser.) investigator; service auditor; shopping inspector; spotter.

Shops in commercial, retail, and service establishments to test integrity of sales and service personnel, and evaluates sales techniques and services rendered customers: Reviews establishment's policies and standards to ascertain employee-performance requirements. Buys merchandise, orders food, or utilizes services to evaluate sales technique and courtesy of employee. Carries merchandise to check stand or sales counter and observes employee during sales transaction to detect irregularities in listing or calling prices, itemizing merchandise, or handling cash. Delivers purchases to agency conducting shopping investigation service. Writes report of investigations for each establishment visited. Usually works as member of shopping investigation crew.

922.687-054 LABORATORY-SAMPLE CARRIER (any ind.) sample gatherer; sampler.

Collects samples of products or raw materials for laboratory analysis, performing any combination of following tasks: Turns valves or dips sample container to transfer liquid samples from pipeline, processing equipment, tanks, or other vessels to test tubes, bottles, or buckets. Transfers dry samples, such as ore, grain, crystals, powder, or granular material to containers, using shovel, hand scoop, sample stick, or special handtool. Labels sample containers with identifying data, location of sample, and time collected. Delivers samples to laboratory for analysis. Cleans sample containers, using specified cleaning agents and brushes or scrapers. Usually gathers samples at specified locations, stages of processing, and time interval. May collect samples of grain shipments for use by government inspectors in grading grain and be designated GRAIN SAMPLER (finan. inst.; whole. tr.). May collect samples of radioactive waste following prescribed safety procedures and be designated SAMPLER, RADIOACTIVE WASTE (chem.).

222.387-050 SHIPPING AND RECEIVING CLERK (clerical)

Verifies and keeps records on incoming and outgoing shipments and prepares items for shipment: Compares identifying

information and counts, weighs, or measures items of incoming and outgoing shipments to verify against bills of lading, invoices, orders, or other records. Determines method of shipment, utilizing knowledge of shipping procedures, routes, and rates. Assembles wooden or cardboard containers or selects preassembled containers. Inserts items into containers, using spacers, fillers, and protective padding. Nails covers on wooden crates and binds containers with metal tape, using strapping machine. Stamps, stencils, or glues identifying information and shipping instructions onto crates or containers. Posts weights, shipping charges and affixes postage. Unpacks and examines incoming shipments, rejects damaged items, records shortages, and corresponds with shipper to rectify damages and shortages. Routes items to departments. May operate tier-lift truck or use handtruck to move, convey, or hoist shipments from shipping-and-receiving platform to storage or work area. May direct others in preparing outgoing and receiving activities and be known as SHIPPING CLERK (clerical) or RECEIVING CLERK (clerical). May be designated according to specialty as FREIGHT CLERK (clerical); RESHIPPING CLERK (clerical). May receive damaged or defective goods returned to establishment and be designated RETURNED-GOODS RECEIVING CLERK (clerical). May recieve unsold products returned by DRIVER, SALES ROUTE (ret. tr.; whole tr.) and be designated ROUTE RETURNER (clerical).

SUPERVISOR (any ind.) boss; chief; head; leader; manager; overlooker; overseer; principal; section chief; section leader.

Supervises and coordinates activities of workers engaged in one or more occupations: Studies production schedules and estimates worker-hour requirements for completion of job assignment. Interprets company policies to workers and enforces safety regulations. Interprets specifications, blueprints, and job orders to workers, and assigns duties. Establishes or adjusts work procedures to meet production schedules, using knowledge of capacities of machines and equipment. Recommends measures to improve production methods, equipment performance, and quality of product, and suggests changes in working conditions and use of equipment to increase efficiency of shop, department, or work crew. Analyzes and resolves work problems, or assists workers in solving work problems. Initiates or suggests plans to motivate workers to achieve work goals. Recommends or initiates personnel actions, such as promotions, transfers, discharges, and disciplinary measures. May train new workers. Maintains time and production records. May estimate, requisition, and inspect materials. May confer with other SUPERVISORS (any ind.) to coordinate activities of individual departments. May confer with workers' representatives to resolve grievances. May set up machines and equipment. When supervising workers engaged chiefly in one occupation or craft, is required to be adept in the activities of the workers supervised. When supervising workers engaged in several occupations, is required to possess general knowledge of the activities involved. Classifications are made according to process involved, craft of workers supervised, product manufactured, or according to industry in which work occurs. Classifications are made according to workers supervised.

222.387-050 SHIPPING AND RECEIVING CLERK (clerical)

Verifies and keeps records on incoming and outgoing shipments and prepares items for shipment: Compares identifying information and counts, weighs, or measures items of incoming and outgoing shipments to verify against bills of lading, invoices, orders, or other records. Determines method of shipment, utilizing knowledge of shipping procedures, routes, and rates. Assembles wooden or cardboard containers or selects preassembled containers. Inserts items into containers, using spacers, fillers, and protective padding. Nails covers on wooden crates and binds containers with metal tape, using strapping machine. Stamps, stencils, or glues identifying information and shipping instructions onto crates or containers. Posts weights, shipping charges and affixes postage. Unpacks and examines incoming shipments, rejects damaged items, records shortages, and corresponds with shipper to rectify damages and shortages. Routes items to departments. May operate tier-lift truck or use handtruck to move, convey, or hoist shipments from shipping-and-receiving platform to storage or work area. May direct others in preparing outgoing and receiving incoming shipments. May perform only shipping or receiving activities and be known as SHIPPING CLERK

(clerical) or RECEIVING CLERK (clerical) May be designated according to specialty as FREIGHT CLERK (clerical); RESHIPPING CLERK (clerical) May receive damaged or defective goods returned to establishment and be designated RETURNED-GOODS RECEIVING CLERK (clerical). May receive unsold products returned by DRIVER, SALES ROUTE (ret. tr.; whole tr.) and be designated ROUTE RETURNER (clerical).

237.367-038 RECEPTIONIST (clerical) reception clerk

Receives callers at establishment, determines nature of business, and directs callers to destination: Obtains caller's name and arranges for appointment with person called upon. Directs caller to destination and records name, time of call, nature of business, and person called upon. May issue visitor's pass when required. May make future apoointments and answer inquiries [INFORMATION CLERK (clerical)]. May perform variety of clerical duties [ADMINISTRATIVE CLERK (clerical)] and other duties pertinent to type of establishment. May collect and distribute mail and messages. May receive patients in office of DENTIST (medical ser.); PHYSICIAN (medical ser.), or other health service, and be designated as OUTPATIENT RECEPTIONIST (medical ser.) or RECEPTIONIST, DOCTOR'S OFFICE (medical ser.).